

Level 3 Certificate in Facilities Management Practice (7724)

City Guilds

Learner logbook

600/0605/5

www.cityandguilds.com
October 2011
Version 1.0

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1 About your learner logbook

1.1 Contact details

Learner name	
Learner enrolment no	
Centre name	
Centre number	
Qualification Start date	

Keep a record of relevant contact details in the space provided below. You may find it helpful to make a note of phone numbers and e-mail addresses here.

Your Assessor(s)	
Your Internal Verifier	
Quality Assurance Contact	

1 About your learner logbook

1.2 Introduction to the logbook

This logbook will help you complete your qualification. It contains:

- the units you need to achieve to complete your Certificate
- information about your responsibilities as a learner
- forms you can use to record and organise your evidence.

It will also tell you:

- about the qualification
- what you need to do to complete your Certificate
- who will help you.

About City & Guilds

City & Guilds is your awarding body for the Level 3 Certificate in Facilities Management Practice (7724). City & Guilds is the UK's leading awarding body for vocational qualifications.

Information about City & Guilds and our qualifications is available on our website **www.cityandguilds.com**.

2 About this qualification

The Level 3 Certificate in Facilities Management Practice (7724) is a nationally recognised qualification gained in the workplace. It is based on National Occupational Standards, which are standards written by employers and experts in your industry.

When you achieve your qualification it will prove that you can work to the standards expected by employers in your industry. This qualification will show you are competent to do a job and have the skills, knowledge and understanding needed to do it well.

This qualification is assessed in the work place. Therefore, you should be carrying out the type of work involved in this qualification, or expect to carry it out in the future. If you are not in work, your centre will need to arrange a work placement for your assessment.

The structure of the Framework

How is a Framework qualification made up?

Each Framework qualification is made up of a number of **units**. Each unit covers a different work activity so you can build up to the full qualification unit by unit. Within this qualification there are two different types of units.

Your centre will explain which units you need to take and help you choose those that best match your job.

Mandatory units

You will have to complete all of these units to get your qualification.

Optional units

You may be able to choose from a number of optional units. You will be helped to choose the best optional units to match your job or interests.

Structure of a unit

Units describe what you must be able to do to show you can competently perform activities in your job. Units are broken down into

- **outcomes** – the tasks you need to do
- **performance criteria** – which describe what you have to do to for each task
- **knowledge criteria** – describing what you need to know and understand
- **evidence requirements** – a summary of the evidence you need to prove you are competent.

3 About approved centres

3.1 Types of centres

Assessment for your qualification will be carried out at your centre. Your centre may be your place of work, a college, training provider or a combination of these.

City & Guilds approves centres to offer these qualifications and regularly monitors them to make sure they meet our quality standards and follow our assessment policies.

Centre responsibilities

Your centre is responsible for the administration of your qualification. Centre staff will:

- register you with City & Guilds
- give you your City & Guilds enrolment number
- apply for your certificate(s) when you have completed your qualification or units.

Centres are also responsible for supporting you as you work towards your qualification. Your centre will:

- carry out an initial assessment with you
- tell you about any learning or training (and resources) you will need to help you complete your qualification
- provide an induction programme to explain how the qualification assessment process works
- produce an assessment plan for you.

Assessment roles

The following people at your centre will help you achieve your qualification.

The assessor

The assessor is the person you will have the most contact with as you work towards your qualification. Your assessor will:

- help you identify any training you need
- agree an assessment plan with you
- help you plan and organise your workload and evidence
- observe you carrying out your job in the workplace over a period of time
- ask you questions about the work you do
- make decisions about your evidence
- judge when you are competent and meet the national standards
- give you feedback about your evidence and competence.

Your assessor may be your manager or supervisor at work. You may have more than one assessor depending on which units of the qualification you take.

The internal verifier

The internal verifier maintains the quality of assessment within the centre.

The external verifier

The external verifier is employed by City & Guilds to ensure that your centre meets the required national standards for quality and assessment.

The mentor

The mentor is someone in your workplace who can help and support you as you are working towards your qualification but does not carry out assessments. They may be able to provide you with witness testimony for your qualification.

Witnesses

Witnesses do not judge your overall competence but may provide statements about your performance which can be used as evidence of your work.

4 About Framework learners

Learner role and responsibilities

Your responsibilities as a City & Guilds learner is to

- provide your centre with personal details so you can be registered with City & Guilds
- participate in an initial assessment and induction
- agree a personal assessment plan with your assessor
- collect and organise your evidence as agreed in your assessment plan
- attend regular meetings with your assessor to discuss your progress and to amend your plan when required
- meet with other centre and City & Guilds staff to talk about your evidence and qualification
- make sure you understand and comply with Health and Safety law and regulations.

Your centre **may** ask you to agree and sign a learning contract with them to show how you will be assessed for your qualification.

Learner enrolment number

Make sure you keep a note of your unique City & Guilds enrolment number on the front page of this logbook. You will need this number again if you take any other City & Guilds qualifications. Using the same enrolment number helps City & Guilds keep a record of every unit and qualification you complete.

Moving to a new centre

If you change jobs or move to a new centre, before you complete this qualification, you may be able to complete it at a new centre. Ask your centre to apply for any certificates of unit credit for you before you leave, and add them to your records.

A new centre will need your learner enrolment number, your assessment records and evidence to help you complete your qualification.

5 The assessment process

Before you start your qualification

Initial assessment

Before you start work on the Level 3 Certificate in Facilities Management Practice you will meet with your assessor to discuss what you need to do to complete your qualification. This can include:

- checking you are taking the right level
- checking you have chosen suitable units
- identifying any training or learning you will need to help you gain your qualification
- agreeing an assessment plan
- signing a learning contract.

Skill scan

As part of this meeting, you will discuss the skills and knowledge you may already have, and decide how this can be used towards your Level 3 Certificate in Facilities Management Practice. This process is sometimes called a Skill scan (see Appendix 3).

Assessment principles

- Assessment should normally be at the learner's workplace. Where the opportunity to assess across the range of standards is unavailable, other comparable working environments may be used, following agreement from the External Verifier.
- A holistic approach towards the collection of evidence should be encouraged, assessing activities generated by the whole work experience rather than focusing on specific tasks. For example, if the learner communicates with a customer whilst engaged in cleaning activities these can be assessed against both cleaning and customer service elements.
- Assessors can only assess in their acknowledged area of occupational competence.
- Assessors and Internal Verifiers will be registered with their Approved Centre and be accountable to the organisation for their assessment practice.
- The health and safety of customers and employees must be maintained throughout the assessment process. If any person carrying out assessment or verification activities feels that due regard to health and safety is not being taken, they should refuse to continue with the activity(ies) until satisfied that the situation has been resolved.

Simulation and witness testimony

There are a few occasions when simulation or witness testimony may be used and the centre can demonstrate that performance evidence has been impossible to obtain. The underlying reasons for either simulation or witness testimony are:

- health and safety considerations
- activities that would cause serious inconvenience or loss to an employer if there was an undue delay in their being carried out
- infrequently occurring activities
- equality of access.

Simulation

Simulation may be necessary for specific elements of some units. Where simulation is necessary, demands on the learner should be neither more nor less than they would encounter in a real work situation. In particular:

- simulations must be planned, developed and documented by the centre in a way that ensures the simulation accurately reflects what the unit seeks to assess
- simulations should follow the documented plans
- a centre's overall strategy for simulation must be examined and approved by the external verifier
- there should be a range of simulations to cover the same aspect of the standard so that the risk of learners successfully colluding is reduced
- the nature of the contingency must be realistic
- the physical environment for the simulation must be as realistic as possible and draw on real resources that would be used in the industry

Witness Testimony

Witness testimony should not form the main source of evidence. Centres must comply with City & Guilds guidance over the occupational competence and briefing of witnesses in the use of witness testimony.

Recognition of prior learning and experience (RPL)

Recognition of Prior Learning (RPL) recognises where the learner's previous experience could contribute to a qualification.

- Evidence from past achievement may be included as permissible evidence within assessment methods.
- Evidence of prior knowledge and understanding can be offered as supplementary evidence, as long as it is a measurable assessed outcome of learning which links to the unit of assessment.
- Assessors should make best use of all the assessment methods available to them in ensuring the most reliable and effective use is made of claims of prior learning and experience which relate to the individual circumstances.
- All learners must demonstrate current competence with respect to recognition of prior learning (RPL).

6 Using your logbook

Recording forms

This logbook contains all of the forms you and your assessor will need to plan, review and organise your evidence. Your assessor will be able to help you decide which forms you need to complete and help you fill them in.

General report (see Appendix 2)

Learner job profile

You can use this form to record your personal details if you don't already have a Learner résumé/ CV.

Skill scan/initial assessment (see Appendix 3)

This can be used to record the skills and knowledge you may already have. This may be part of your initial assessment.

Expert/witness status list (see Appendix 4)

This is used to record the details of staff that will provide you with witness testimony.

Assessment/action planning (see Appendix 5)

You and your assessor will use this form to feedback after each session. It will also enable you and your assessor to plan what actions need to be done before the next session.

Summary of achievement (see Appendix 6)

Unit achievement list (see Appendix 7)

Please photocopy these forms as required.

7 Qualification structure

To achieve the **Level 3 Certificate in Facilities Management Practice**, learners must achieve a minimum of 31 credits. This is made up of 15 credits from the 3 mandatory units, plus 5 credits from suite one, 8 credits from suite two, and 3 credits from suite three.

Unit	Unit Title	Unit accreditation number	Credit value
Mandatory units (15 credits)			
201	Develop working relationships with colleagues	H/600/9660	3
301	Provide and monitor facilities for clients	H/601/6723	6
401	Develop and implement a risk assessment plan in own area of responsibility	L/600/9703	6
Optional units (Suite one - a minimum of 5 credits)			
303	Contribute to the management of incidents and emergencies	L/601/6974	5
304	Monitor and solve customer service problems	J/601/1515	6
305	Set objectives and provide support for team members	M/600/9600	5
309	Procure supplies	L/600/9734	2
Optional units (Suite two - a minimum of 8 credits)			
302	Manage facilities management projects	T/601/6984	6
306	Monitoring operational performance	H/601/7001	5
307	Operate security measures	K/601/8599	3
308	Maintain property and assets	M/601/7051	5
310	Contribute to disaster recovery and contingency planning	A/601/7053	5
311	Manage space	F/601/7054	6
312	Carry out energy management	J/601/7055	6
Optional units (Suite three - a minimum of 3 credits)			
402	Understanding sustainability and environmental issues and the impact on facilities management	R/601/2134	3
403	Provide leadership and direction for own area of responsibility	T/600/9601	5
404	Implement change in own area of responsibility	M/600/9659	6
405	Specify, commission and manage external contracts and agreements	F/601/4090	9
501	Recruit staff in own area of responsibility	T/600/9663	4
502	Manage a budget for own area or activity of work	A/600/9695	7

8 Learner job profile

If you already have your own CV you can use that instead of this form.

Name:

Place of Work:

Assessor:

Outline of job role

Previous roles & responsibilities relevant to the qualification:

Previous qualification and training relevant to the qualification:

Unit 201

Develop working relationships with colleagues

Level:	2
Credit value:	3
GLH	15

Unit aim

This unit is for first line managers/supervisors and is about establishing the nature of facilities required by clients and monitoring their delivery.

Learning outcomes

1. Understand the benefits of working with colleagues
2. Be able to establish working relationships with colleagues
3. Be able to act in a professional and respectful manner when working with colleagues
4. Be able to communicate with colleagues
5. Be able to identify potential work-related difficulties and explore solutions

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 201

Develop working relationships with colleagues

Understand the benefits of working with colleagues		
You must be able to:		PRN
1	Describe the benefits of productive working relationships	

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to establish working relationships with colleagues							
1	Identify colleagues within own and other organisations						
2	Agree the roles and responsibilities for colleagues						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to act in a professional and respectful manner when working with colleagues							
1	Explain how to display behaviour that shows professionalism						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to communicate with colleagues							
1	Identify information to others clearly and concisely						
2	Explain how to receive and clarify own understanding of information						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to identify potential work-related difficulties and explore solutions							
1	Identify potential work-related difficulties and conflicts of interest						
2	Explain how to resolve identified potential difficulties						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Level: 3
Credit value: 6
GLH: 35

Unit aim

This unit is for first line managers/supervisors and is about establishing the nature of facilities required by clients and monitoring their delivery.

Learning outcomes

1. Understand the facilities service needs of clients
2. Be able to negotiate the delivery of services to clients
3. Be able to organise the delivery of services
4. Be able to communicate with colleagues

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Understand the facilities service needs of clients		
You must be able to:		PRN
1	Describe how different organisational structures and cultures create different types of facilities management requirements	
2	Describe the relationship between the client's core business drivers and facilities management functions	
3	Explain the role of facilities management services in achieving the client's business objectives	
4	Identify the types of additional or improved services which can be offered to clients in order to exploit business opportunities	

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to negotiate the delivery of services to clients							
1	Assist clients in establishing the nature of the facilities management services they require						
2	Identify cost effective facilities management services which are consistent with the client's objectives, policies and constraints						
3	Check that proposed services comply with legal and regulatory requirements						
4	Identify the range of office services, equipment and resources to be used to deliver the agreed facilities management programme						
5	Agree effective formal agreements with clients and how they will be monitored						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to organise the delivery of services							
1	Explain the content and requirements of service level agreements to deliver services						
2	Carry out work in accordance with service level agreements, approved procedures and instructions						
3	Ensure behaviour, appearance and dress meet organisational requirements						
4	Communicate with colleagues, clients and others in a way that promotes effective formal and informal working relationships						
5	Ensure that information, instructions and documentation given to others is authorised, accurate and up to date						
6	Work safely following agreed procedures						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)						
Be able to communicate with colleagues								
1	Follow procedures for monitoring the delivery of the agreed services							
2	Maintain accurate and up-to-date records of all monitoring and evaluation activity using agreed formats							
3	Identify problems likely to affect the safety and use of premises and take immediate remedial action							
4	Report on service delivery to clients							
5	Evaluate if facilities and services are meeting original requirements and identify additional services that could be offered							
6	Identify alternative ways of improving service delivery and make recommendations and suggestions to clients							
		Type of evidence →						

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Level: 3
Credit value: 6
GLH: 37

Unit aim

This unit helps learners to provide leadership and direction for their area of responsibility.

Learning outcomes

1. Understand the project planning process
2. Be able to plan the delivery of projects
3. Be able to carry out facilities management projects

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Understand the project planning process		
You must be able to:		PRN
1	Identify the primary components of project planning	
2	Describe different models of project management and planning	
3	Identify methods for assessing risk and ways of minimising them	
4	Explain the impact of resources and financial control on project planning	
5	Identify ways of estimating the human, physical and time resources required for delivery of the project	
6	Identify measurable outcomes and evaluation methods	

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to plan the delivery of projects							
1	Establish the project's scope and definition and its contribution to the wider objectives of the organisation						
2	Identify the key stakeholders and their expectations of the project						
3	Establish the financial, physical and time resources and constraints for the project						
4	Conduct a risk assessment and identify risk control measures required						
5	Agree methods of communication and reporting of project progress						
6	Identify measures by which the project outcomes will be assessed						
7	Plan for contingencies throughout the life of the project						
8	Establish the skills mix required to achieve the project's outcomes and where to obtain the skills						
9	Develop a detailed project plan and evaluate its feasibility						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)						
Be able to carry out facilities management projects								
1	Establish and assign roles and responsibilities for those involved in project							
2	Assist in selecting and supporting team members							
3	Establish and maintain clear lines of reporting and control							
4	Contribute to effective communication and information exchange across team members							
5	Set up and operate effective financial and resource control systems, working with others							
6	Obtain feedback on success of project against agreed outcomes							
		Type of evidence →						

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 303

Contribute to the management of incidents and emergencies

Level:	3
Credit value:	5
GLH:	30

Unit aim

This unit is for first line managers/supervisors working in facilities management and is about contributing to the management of incidents and emergencies by reporting them and helping to correct them.

Learning outcomes

1. Understand the procedures for dealing with incidents and emergencies
2. Be able to report incidents and emergencies
3. Be able to contribute to the correction of incidents and emergencies

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 303

Contribute to the management of incidents and emergencies

Understand the procedures for dealing with incidents and emergencies		
You must be able to:		PRN
1	Explain the implications of statutory requirements when dealing with incidents and emergencies	
2	Identify the emergency procedures for plant and site for different types of incidents and emergencies	
3	Explain the types of incidents and emergencies which should be reported including: <ul style="list-style-type: none"> • Fire • Flood • Toxic vapour and/or liquid release • Explosions • Injured personnel • Major plant or service failure 	
4	Explain how to interpret operational policies, procedures, instructions, codes of practice, standards and schedules relating to incidents and emergencies	
5	Explain the procedure for responding in the early stages of an incident and/or emergency	
6	Describe own role and responsibilities during incidents and emergencies	
7	Identify communication channels to be used in different types of incident and/or emergency	
8	Explain the correct first response to dealing with casualties	

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to report incidents and emergencies							
1	Identify the nature, location and scope of the incident and/or emergency						
2	Raise the appropriate alarms						
3	Report the incident to appropriate people in accordance with organisational and/or plant reporting procedures						
4	Provide accurate and unambiguous information to appropriate people						
5	Complete all relevant documentation accurately following agreed formats						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)						
Be able to contribute to the correction of incidents and emergencies								
1	Follow appropriate procedures after the situation has been assessed							
2	Act promptly and in association with others							
3	Interpret operational policies, procedures, instructions, codes of practice, standards and schedules relating to incidents and emergencies							
4	Select, issue and use appropriate personal protective equipment appropriate to the incident and/or emergency							
5	Select and use the correct emergency equipment							
6	Inform appropriate people as actions are taken							
7	Take the correct actions promptly, in accordance with procedures to deal with the incident and/or emergency in a safe manner							
8	Minimise damage, waste and loss resulting from the incident and/or emergency							
9	Modify actions in response to changing conditions							
10	Work safely in accordance with operational requirements							
		Type of evidence →						

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Level:	3
Credit value:	6
GLH:	40

Unit aim

The learner's job involves delivering and organising excellent customer service. However good the service provided, some of their customers will experience problems and the learner will spot and solve other problems before their customers even know about them. This Unit is about the part of their job that involves solving immediate customer service problems. It is also about changing systems to avoid repeated customer service problems. Remember that some customers judge the quality of their customer service by the way that the learner solves customer service problems. The learner can impress customers and build customer loyalty by sorting out those problems efficiently and effectively. Sometimes a customer service problem presents an opportunity to impress a customer in a way that would not have been possible if everything had gone smoothly.

Learning outcomes

1. Be able to solve immediate customer service problems
2. Be able to identify repeated customer service problems and options for solving them
3. Be able to take action to avoid the repetition of customer service problems
4. Understand how to monitor and solve customer service problems

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to solve immediate customer service problems							
1	respond positively to customer service problems following organisational guidelines						
2	solve customer service problems when they have sufficient authority						
3	work with others to solve customer service problems						
4	keep customers informed of the actions being taken						
5	check with customers that they are comfortable with the actions being taken						
6	solve problems with service systems and procedures that might affect customers before customers become aware of them						
7	inform managers and colleagues of the steps taken to solve specific problems						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to identify repeated customer service problems and options for solving them							
1	identify repeated customer service problems						
2	identify the options for dealing with a repeated customer service problem and consider the advantages and disadvantages of each option						
3	work with others to select the best option for solving a repeated customer service problem, balancing customer expectations with the needs of the organisation						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required	Portfolio Reference No. (PRN)							
Be able to take action to avoid the repetition of customer service problems								
1	obtain the approval of somebody with sufficient authority to change organisational guidelines in order to reduce the chance of a problem being repeated							
2	action their agreed solution							
3	keep their customers informed in a positive and clear manner of steps being taken to solve any service problems							
4	monitor the changes they have made and adjust them if appropriate							
Type of evidence →								

O = Observation Q = Question & answer S = Simulation/RWE

Understand how to monitor and solve customer service problems	
You must be able to:	PRN
1	describe organisational procedures and systems for dealing with customer service problems
2	describe the organisational procedures and systems for identifying repeated customer service problems
3	explain how the successful resolution of customer service problems contributes to customer loyalty with the external customer and improved working relationships with service partners or internal customers
4	explain how to negotiate with and reassure customers while their problems are being solved

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 305

Set objectives and provide support for team members

Level:	3
Credit value:	5
GLH:	35

Unit aim

This unit helps learners to set and support individuals and teams to achieve objectives.

Learning outcomes

1. Be able to communicate a team's purpose and objectives to the team members
2. Be able to develop a plan with team members showing how team objectives will be met
3. Be able to support team members identifying opportunities and providing support
4. Be able to monitor and evaluate progress and recognise individual and team achievement

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 305

Set objectives and provide support for team members

Performance evidence required		Portfolio Reference No. (PRN)							
Be able to communicate a team's purpose and objectives to the team members									
1	Describe the purpose of a team								
2	Set team objectives with its members which are SMART (Specific, Measurable, Achievable, Realistic and Time-bound)								
3	Communicate the team's purpose and objectives to its members								
Type of evidence →									

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)							
Be able to develop a plan with team members showing how team objectives will be met									
1	Discuss with team members how team objectives will be met								
2	Ensure team members participate in the planning process and think creatively								
3	Develop plans to meet team objectives								
4	Set SMART personal work objectives with team members								
Type of evidence →									

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)							
Be able to support team members identifying opportunities and providing support									
1	Identify opportunities and difficulties faced by team members								
2	Discuss identified opportunities and difficulties with team members								
3	Provide advice and support to team members to overcome identified difficulties and challenges								
4	Provide advice and support to team members to make the most of identified opportunities								
Type of evidence →									

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)						
Be able to monitor and evaluate progress and recognise individual and team achievement								
1	Monitor and evaluate individual and team activities and progress							
2	Provide recognition when individual and team objectives have been achieved							
		Type of evidence →						

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Level: 3
Credit value: 5
GLH: 27

Unit aim

This unit is for first line managers and supervisors working in facilities management and is about managing operational performance and monitoring the outcomes of facilities and services provided in house or by external contractors.

Learning outcomes

1. Understand the principles of operational performance measurement
2. Be able to establish and monitor performance indicators

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Understand the principles of operational performance measurement		
You must be able to:		PRN
1	Explain how performance measurement contributes to organisational objectives and activities	
2	Identify external operational standards and standard setting bodies	
3	Explain procurement theories, models and practices for operational and contract management	
4	Identify systems for gathering business data to allow the measurement of historical performance	

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to establish and monitor performance indicators							
1	Align operational business activities to a common set of objectives to improve effectiveness						
2	Specify performance indicators that can be cost effectively measured in terms of what needs to be delivered, to what standard and in what timeframe(s)						
3	Ensure that systems are in place to set, gather, collate, analyse and refine the key performance information from operational clusters						
4	Establish and operate systems for communicating variances between actual performance and targets clearly to permit senior management to take appropriate action						
5	Ensure regular monitoring of contractor performance against contracts, service level agreements and other performance measurement tools						
6	Establish effective control systems to monitor progress and identify and record deviations from service levels						
7	Re-define contract results where monitoring indicates this is necessary						
8	Provide contractors with the necessary information and accurate feedback on their work to enable them to deliver the required operational outcomes						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 307

Operate security measures

Level:	3
Credit value:	3
GLH:	15

Unit aim

This unit will ensure that learners are able to determine the effectiveness of current security measures and report any weaknesses in security measures.

Learning outcomes

1. Be able to determine the effectiveness of current security measures
2. Be able to report any weaknesses in security measures

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 307

Operate security measures

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to determine the effectiveness of current security measures							
1	Carry out a security risk assessment						
2	Collate and review information on the operation and effectiveness of current security systems and procedures						
3	Carry out physical checks on all security systems						
4	Identify the weaknesses, restrictions and limitations of current security systems and procedures						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to report any weaknesses in security measures							
1	Identify any immediate risks to assets and inform own organisation and clients of critical weaknesses in security measures						
2	Provide own organisation and clients with information on the effectiveness of security measures						
3	Make recommendations for improvements to security measures to the appropriate person						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Level: 3
Credit value: 5
GLH: 30

Unit aim

This unit is for first line managers and supervisors working in facilities management and is about ensuring that maintenance activities are carried out effectively.

Learning outcomes

1. Be able to identify maintenance requirements
2. Be able to plan and schedule the maintenance of property and assets
3. Be able to carry out required maintenance activities

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to identify maintenance requirements							
1	Identify the different types of maintenance required for particular properties and assets						
2	Identify the legislation controlling the carrying out of maintenance activities						
3	Review information on property's age, condition and usage together with previous maintenance activity						
4	Conduct maintenance inspections and identify faults and problems requiring corrective or preventative action and keep accurate records of inspections						
5	Ensure that clients and building users obligations comply with statutory and lease requirements						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to plan and schedule the maintenance of property and assets							
1	Prioritise the type and nature of maintenance activity required						
2	Prepare or review existing maintenance plans and schedules						
3	Identify the resources or expertise required to carry out maintenance activity against agreed budget						
4	Organise the required resources, expertise or specialist services and agree timing and costs of activity						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to carry out required maintenance activities							
1	Ensure authorisation has been given for maintenance activity and costs						
2	Agree with clients and building users the nature and timing of maintenance activity and any implications for them						
3	Monitor the quality of maintenance activities and maintain accurate records						
4	Review maintenance requirements over time in relation to building and assets usage and recommend changes as required						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Level:	3
Credit value:	2
GLH:	20

Unit aim

This unit will ensure that learners are able to identify required supplies, procure supplies and monitor their delivery.

Learning outcomes

1. Be able to identify requirements for supplies
2. Be able to evaluate suppliers that meet identified requirements
3. Be able to select suppliers and obtain supplies
4. Be able to monitor supplier performance

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 309

Procure supplies

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to identify requirements for supplies							
1	Select colleagues to agree requirements for supplies						
2	Produce a specification for supply requirements						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to evaluate suppliers that meet identified requirements							
1	Identify suppliers that meet resource, organisational and legal requirements						
2	Evaluate suppliers against requirements						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to select suppliers and obtain supplies							
1	Select supplier(s) that best meet requirements						
2	Explain how to agree with the contractual terms with selected supplier(s)						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to monitor supplier performance							
1	Identify how to monitor supplier performance and delivery against agreed contractual terms						
2	Explain the procedure for dealing with breaches of contract						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 310

Contribute to disaster recovery and contingency planning

Level:	3
Credit value:	5
GLH:	31

Unit aim

This unit is for first line managers and supervisors and is about contributing to the management of disaster recovery and contingency planning.

Learning outcomes

1. Understand the principles and processes involved in disaster recovery and contingency planning
2. Be able to identify disaster recovery and contingency planning requirements
3. Be able to monitor and adjust disaster recovery and contingency planning processes

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 310

Contribute to disaster recovery and contingency planning

Understand the principles and processes involved in disaster recovery and contingency planning

You must be able to:		PRN
1	Explain the main features of a disaster recovery and contingency planning policy within a facilities management context	
2	Identify the sector specific legislation, regulations, guidelines and codes of practice relating to disaster recovery and contingency planning	
3	Describe ways in which disaster recovery and contingency planning policies and procedures are communicated to others	
4	Explain procedures for identifying hazards and assessing risks in relation to disaster planning and contingency planning	
5	Describe the procedures and systems for monitoring, measuring and reporting on disaster recovery and contingency planning	
6	Identify the major parties/stakeholders with an interest in disaster recovery and contingency planning	

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to identify disaster recovery and contingency planning requirements							
1	Identify your personal responsibilities and contribution to disaster recovery and contingency planning policies and plans						
2	Seek and make use of specialist expertise in relation to disaster planning and contingency planning						
3	Develop a partnership with clients to address adequately all recovery aspects of business functionality in relation to facilities management services						
4	Ensure that a system is in place for identifying hazards and assessing risks in your area of responsibility and take measures to eliminate or control them						
5	Ensure that sufficient resources are allocated across your area of responsibility to deal with disaster recovery and contingency planning issues						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to monitor and adjust disaster recovery and contingency planning processes							
1	Develop a culture within your area of responsibility which puts disaster recovery and contingency planning a major priority						
2	Consult regularly with people in your area of responsibility or their representatives on disaster recovery and contingency planning issues						
3	Operate systems for the effective monitoring, measuring, implementation testing and reporting of disaster recovery and contingency planning performance in your area of responsibility						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Level: 3
Credit value: 6
GLH: 33

Unit aim

This unit is for first line managers and supervisors working in facilities management and is about managing the efficient use of space within a facility.

Learning outcomes

1. Understand the principles of space utilisation
2. Be able to identify the space needs of clients
3. Be able to manage the space needs of clients

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Understand the principles of space utilisation		
You must be able to:		PRN
1	Explain how to identify, prioritise and balance the space needs of individual clients in a managed facility	
2	Identify the criteria used in the allocation of space to ensure that the needs of all clients are taken into account	
3	Identify the legislative and regulatory factors influencing the use of space	

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to identify the space needs of clients							
1	Allocate space and facility allocation against identified needs and priorities						
2	Ensure that space and facility allocation is confirmed with property owners, clients and other interested parties						
3	Ensure that space and facility allocation is compatible with adjacent uses and relevant legislation						
4	Ensure that approvals required for planned allocation of space and facilities are notified to clients						
5	Identify where space and/or facilities requested exceed what is available or can be provided and realistic alternatives discussed with clients						
6	Ensure regular consultation with people in your area of responsibility or their representatives on space management issues						
7	Seek and make use of specialist expertise in relation to space management						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to manage the space needs of clients							
1	Review the options for occupancy, use, facilities, servicing and maintenance regularly with clients and advise on potential benefits of any planned change						
2	Operate appropriate monitoring and control systems to ensure the continuing effective use of space						
3	Ensure that legal and regulatory requirements are met in relation to: <ul style="list-style-type: none"> insurance cover linked to types of use and categories of occupier required certificates, approvals and inspection reports 						
4	Conduct regular reviews with clients on existing and future space and facility needs and revise delivery plans						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 312

Carry out energy management

Level:	3
Credit value:	6
GLH:	39

Unit aim

The aim of this unit is for learners to understand the principles of energy management and to be able to identify energy management processes.

Learning outcomes

1. Understand the principles of energy management
2. Be able to identify energy management processes

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 312

Carry out energy management

Understand the principles of energy management		
You must be able to:		PRN
1	Explain the importance of energy management in the workplace	
2	Identify the legislation, regulations, guidelines, codes of practice and best practice which impact on energy management	
3	Explain the major methods and systems for managing energy use	
4	Explain methods of creating and communicating energy management policies and procedures	
5	Explain ways of evaluating the advantages and disadvantages of different strategies and methods for implementing energy management policies	

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to identify energy management processes							
1	Identify realistic goals for savings and improvements in energy usage						
2	Identify own personal responsibilities and liabilities for energy management						
3	Agree the strategies and methods for implementing the energy management policy						
4	Identify sources of energy and water wastage on site and make recommendations on how to minimise them						
5	Seek and make use of specialist expertise in relation to energy management						
6	Ensure advice on energy management is based on accurate, relevant and up to date information						
7	Give advice to clients which takes into account organisational objectives and constraints which influence energy use						
8	Ensure that sufficient resources are allocated across your area of responsibility to deal with energy management issues						
9	Ensure that systems are in place for the effective monitoring, measuring, implementation, testing and reporting of energy management performance in your area of responsibility						
10	Conduct regular reviews with clients on existing and future energy management needs and revise delivery plans						
Type of evidence →							

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 401

Develop and implement a risk assessment plan in own area of responsibility

Level:	4
Credit value:	6
GLH:	20

Unit aim

This unit helps learners promote, monitor and review health and safety in own area of responsibility.

Learning outcomes

1. Understand the legal requirements and personal responsibilities for health and safety within an organisation
2. Be able to promote the importance of health and safety practices
3. Be able to ensure that hazards and risks are identified and managed in own area of responsibility
4. Be able to monitor and review health and safety performance and policy in own area of responsibility

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 401

Develop and implement a risk assessment plan in own area of responsibility

Understand the legal requirements and personal responsibilities for health and safety within an organisation		
You must be able to:		PRN
1	State the legal requirements that apply to own role in relation to health and safety	
2	Consult with specialist advisor(s) on health and safety policy and procedures	
3	Explain an organisation's health and safety responsibilities	
4	Describe health and safety responsibilities in own area of responsibility	

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to promote the importance of health and safety practices							
1	Communicate an organisation's written health and safety policy to individuals within own area of responsibility						
2	Allocate sufficient resources to deal with health and safety issues in own area of responsibility						
		Type of evidence →					
O = Observation Q = Question & answer S = Simulation/RWE							

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to ensure that hazards and risks are identified and managed in own area of responsibility							
1	Consult with colleagues on health and safety hazards and risks in own area of responsibility						
2	Assess health and safety hazards and risks in own area of responsibility						
3	Identify hazards and risks that require action to be taken to ensure compliance with legal and organisational requirements						
4	Develop and implement a plan in own area of responsibility						
		Type of evidence →					
O = Observation Q = Question & answer S = Simulation/RWE							

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to monitor and review health and safety performance and policy in own area of responsibility							
1	Establish procedures that monitor health and safety performance in own area of responsibility						
2	Review the health and safety performance of own area of responsibility						
3	Review the health and safety policy in own area of responsibility						
Type of evidence →							

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 402

Understanding sustainability and environmental issues and the impact on facilities management

Level:	4
Credit value:	3
GLH:	12

Unit aim

This unit enables learners to develop their understanding of corporate responsibility and the importance of sustainability and environmental issues and how facilities management impacts on the environment. The unit also develops understanding of the principles and methods of waste management.

Learning outcomes

1. Understand sustainability and corporate responsibility
2. Understand the impact of facilities management on the environment
3. Understand how to manage waste and its safe disposal
4. Understand how to improve environmental awareness and responsibility

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 402

Understanding sustainability and environmental issues and the impact on facilities management

Understand sustainability and corporate responsibility		
You must be able to:		PRN
1	Explain the terms sustainability and corporate responsibility	
2	Explain the legislation that is associated with sustainability and environmental issues	
3	Explain the role and responsibility that a Facilities Manager has in supporting a corporate responsibility policy	

Understand the impact of facilities management on the environment		
You must be able to:		PRN
1	Explain the range of impacts of facilities management activities on the environment	
2	Explain how the Facilities Manager can mitigate, reduce or manage the impact of their activities on the environment	
3	Explain the environmental advantages and disadvantages inherent within the various resources utilised by Facilities Managers	
4	Explain new and ongoing developments in environmental management and explain how these may affect Facilities Managers	

Understand how to manage waste and its safe disposal		
You must be able to:		PRN
1	Explain the principles of waste minimisation	
2	Describe methods and systems used to manage waste	
3	Identify the relevant legislation in relation to handling, transporting, treating and disposing of waste	

Understand how to improve environmental awareness and responsibility		
You must be able to:		PRN
1	Explain how the Facilities Manager can influence uses of natural resources, consumption and emissions control to improve the environment	
2	Explain how the Facilities Manager can increase awareness and involvement of staff, contractors and suppliers in relation to environmental policies and sustainability	

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 403

Provide leadership and direction for own area of responsibility

Level:	4
Credit value:	5
GLH:	30

Unit aim

This unit helps learners to provide leadership and direction for their area of responsibility.

Learning outcomes

1. Be able to lead in own area of responsibility
2. Be able to provide direction and set objectives in own area of responsibility
3. Be able to communicate the direction for own area of responsibility and collect feedback to inform improvement
4. Be able to assess own leadership performance

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 403

Provide leadership and direction for own area of responsibility

Performance evidence required		Portfolio Reference No. (PRN)							
Be able to lead in own area of responsibility									
1	Identify own strengths and ability to lead in a leadership role								
2	Evaluate strengths within own area of responsibility								
		Type of evidence →							

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)							
Be able to provide direction and set objectives in own area of responsibility									
1	Outline direction for own area of responsibility								
2	Implement objectives with colleagues that align with those of the organisation								
		Type of evidence →							

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)							
Be able to communicate the direction for own area of responsibility and collect feedback to inform improvement									
1	Communicate the agreed direction to individuals within own area of responsibility								
2	Collect feedback to inform improvement								
		Type of evidence →							

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)							
Be able to assess own leadership performance									
1	Assess feedback on own leadership performance								
2	Evaluate own leadership performance								
		Type of evidence →							

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 404

Implement change in own area of responsibility

Level:	4
Credit value:	6
GLH:	25

Unit aim

This unit helps learners to implement and evaluate a plan for change in their area of responsibility.

Learning outcomes

1. Understand how to implement change in own area of responsibility
2. Be able to involve and support others through the change process
3. Be able to implement and monitor a plan for change in own area of responsibility

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 404

Implement change in own area of responsibility

Understand how to implement change in own area of responsibility		
You must be able to:		PRN
1	Explain the main models and methods for managing change	

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to involve and support others through the change process							
1	Communicate the benefits of and reasons for change and how they relate to business objectives						
2	Implement and agree a plan to support change						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required	Portfolio Reference No. (PRN)						
Be able to implement and monitor a plan for change in own area of responsibility							
1	Apply SMART (Specific, Measurable, Achievable, Realistic and Timebound) objectives with individuals and teams to plan for change						
2	Assess opportunities and barriers to change						
3	Review action plans and activities according to identified opportunities and barriers to change						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 405

Specify, commission and manage external contracts and agreements

Level:	4
Credit value:	9
GLH:	18

Unit aim

This unit is about helping managers to specify, commission and manage external contracts and agreements, including Service Level Agreements (SLAs). It is designed to include all forms of contracting with outside suppliers. It also includes managing grants made to agencies and community organisations for the provision of services eg grant funding of community safety projects. The term 'agreement' is more commonly used than contract in such cases so both have been used in the unit. Service providers are also more likely to be preparing 'bids' for grants rather than tenders, so both terms have been used. The specification may be for either goods or services so 'supplier/service provider' has been used to include both.

Learning outcomes

1. Understand the requirements for specifying, commissioning and managing external contracts and agreements
2. Be able to specify, commission and manage external contracts and agreements

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 405

Specify, commission and manage external contracts and agreements

Understand the requirements for specifying, commissioning and managing external contracts and agreements

You must be able to:		PRN
1	Outline national and organisational policies and procedures on commissioning and service level agreements	
2	Specify different sources of external suppliers/service providers and how to select them	
3	Describe the different types of contractual agreements that may be used across the sector	
4	Outline the difference between inputs, outputs and outcomes	
5	Describe how to monitor and evaluate contract/agreement progress and compliance, and what steps to take if requirements are not met	
6	Outline the rewards and sanctions relating to the performance of the contractor	
7	Explain the ethical and legal requirements relating to the commissioning process	

Performance evidence required	Portfolio Reference No. (PRN)								
Be able to specify, commission and manage external contracts and agreements									
1	Assess the need for outsourcing products/services and agree with appropriate stakeholders								
2	Develop the contract/agreement specification and agree with appropriate stakeholders								
3	Publicise contract specification in appropriate ways and invite tenders/bids								
4	Draw up a shortlist of potential suppliers/service providers using agreed criteria								
5	Select contractor and establish contractual agreement following agreed national and organisational procedures								
6	Agree and review quality control compliance monitoring procedures								
7	Keep internal and external stakeholders informed about the contractual process								
8	Develop a contract compliance monitoring plan, agreeing protocols and procedures with stakeholders and external suppliers								
9	Implement and manage contract/agreement compliance with external supplier								
10	Review and evaluate contract progress and outcomes with supplier/service provider and agree any actions								
		Type of evidence →							

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Level:	5
Credit value:	4
GLH:	25

Unit aim

This unit helps learners to contribute to the recruitment, selection and induction of staff and evaluate the processes used.

Learning outcomes

1. Be able to review human resource requirements to meet business objectives in own area of responsibility
2. Understand the importance of ensuring that recruitment and selection processes meet legal, regulatory, ethical and social requirements
3. Be able to participate in the recruitment and selection process
4. Be able to evaluate the recruitment and selection process and identify improvements for the future

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 501

Recruit staff in own area of responsibility

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to review human resource requirements to meet business objectives in own area of responsibility							
1	Examine the human resources required to meet objectives in own area of responsibility						
2	Identify gaps between current and required human resources to meet objectives						
3	Assess the options for human resource requirements to meet objectives						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Understand the importance of ensuring that recruitment and selection processes meet legal, regulatory, ethical and social requirements							
You must be able to:							PRN
1	Explain how to ensure recruitment and selection processes are fair						
2	Explain how to ensure that legal requirements, industry regulations, organisational policies and professional codes are met						
3	Explain when to seek specialist expertise throughout the recruitment process						

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to participate in the recruitment and selection process							
1	Consult with relevant others to produce or update job descriptions						
2	Agree with colleagues the stages in the recruitment and selection process for identified vacancies						
3	Identify the methods and criteria that will be used in the recruitment and selection process						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to evaluate the recruitment and selection process and identify improvements for the future							
1	Assess and select learners using agreed methods and criteria						
2	Evaluate the recruitment and selection methods and criteria used in own area of responsibility						
3	Identify ways of improving future recruitment and selection						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Unit 502

Manage a budget for own area or activity of work

Level:	5
Credit value:	7
GLH:	30

Unit aim

This unit helps learners to prepare a budget, address variance and monitor a budget for own area of activity or work.

Learning outcomes

1. Be able to prepare a budget for own area of responsibility
2. Be able to manage a budget
3. Be able to review budget management performance

Assessment

The 'What you must know' learning outcomes (beginning with the word 'understand') will normally be covered by your assessor asking you questions.

'What you must do' learning outcomes (which begin 'be able to'), are mainly assessed by your assessor, observing you carrying out your job, in the workplace. However, where parts of the unit are not carried out on a regular basis, other forms of evidence may be used. The charts below give guidance on the acceptable types of evidence for each statement in the 'what you must do' learning outcomes. Each statement must be covered, but it does not mean that you must provide evidence for all types allowed.

Unit 502

Manage a budget for own area or activity of work

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to prepare a budget for own area of responsibility							
1	Evaluate information on resource requirements for own area of activity or work						
2	Produce a draft budget						
3	Communicate the final budget with relevant stakeholders						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to manage a budget							
1	Analyse variances between planned and actual expenditure						
2	Provide information on performance to relevant stakeholders						
3	Explain how to take corrective action within the limits of own authority, in response to budget variances and developments						
4	Explain proposed revisions to budget and obtain agreement where actions are beyond the scope of own authority						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Performance evidence required		Portfolio Reference No. (PRN)					
Be able to review budget management performance							
1	Review performance against budget						
2	Assess improvements for future budget planning and management						
3	Monitor budget performance and implement changes within the limits of own authority or obtain agreement						
		Type of evidence →					

O = Observation Q = Question & answer S = Simulation/RWE

Confirm completion of this unit using the Summary of Achievement Form (Appendix 6)

Appendix 1 City & Guilds assessment policies summary

Health and Safety

All centres have to make sure that they provide a safe and healthy environment for training, including induction and assessment. City & Guilds external verifiers check this when they visit assessment centres.

You are responsible for making sure that you understand, and comply with, the health and safety practice and policies in the workplace where you will be assessed. Your assessment may be stopped if you do not comply, and your assessor will explain the problem to you. You may need to retake your assessment at a later date.

Equal Opportunities

Your centre will have an equal opportunities policy. Your centre will explain this to you during your induction, and may give you a copy of the policy.

City & Guilds equal opportunities policy is available from our website www.cityandguilds.com, City & Guilds Customer Relations Team or your centre.

Access to assessment

City & Guilds Framework qualifications are open to all learners, whatever their gender, race, creed, age or special needs. Some learners may need extra help with their assessment, for example, a person with a visual impairment may need a reader.

If you think you will need alternative assessment arrangements because you have special needs, you should discuss this with your centre during your induction, and record this on your assessment plan.

City & Guilds will allow centres to make alternative arrangements for you if you are eligible and if the qualification allows for this. This must be agreed before you start your qualification.

City & Guilds guidance and regulations document *Access to assessment and qualifications* is available on the City & Guilds website www.cityandguilds.com, from the City & Guilds Customer Relations Team or your centre.

Complaints and appeals

Centres must have a policy and procedure to deal with any complaints you may have. You may feel you have not been assessed fairly, or may want to appeal against an assessment decision if you do not agree with your assessor.

These procedures will be explained during induction and you will be provided with information about the Quality Assurance Co-ordinator within your centre who is responsible for this.

Most complaints and appeals can be resolved within the centre, but if you follow the centre procedure and are still not satisfied you can complain to City & Guilds.

Appendix 2 General report

Level 3 Certificate in Facilities Management Practice (7724)

Learner:	Assessor:	PRN:
Applicable Units:		

Report

Learning Outcome ref.

Questions asked with answers:

Learning Outcome ref.

Assessor feedback:-

Learner signature..... Date:

Assessor signature..... Date:

Appendix 3 Skill scan/initial assessment

Level 3 Certificate in Facilities Management Practice

Learner name:

Unit	Duties	Examples	Training Required
201	Develop working relationships with colleagues		
	Understand the benefits of working with colleagues		
	Be able to establish working relationships with colleagues		
	Be able to act in a professional and respectful manner when working with colleagues		
	Be able to communicate with colleagues		
301	Provide and monitor facilities for clients		
	Understand the facilities service needs of clients		
	Be able to negotiate the delivery of services to clients		
	Be able to organise the delivery of services		
302	Manage facilities management projects		
	Understand the project planning process		
	Be able to plan the delivery of projects		
303	Contribute to the management of incidents and emergencies		
	Understand the procedures for dealing with incidents and emergencies		
	Be able to report incidents and emergencies		
304	Monitor and solve customer service problems		
	Be able to solve immediate customer service problems		
	Be able to identify repeated customer service problems and options for solving them		

Unit	Duties	Examples	Training Required
	Be able to take action to avoid the repetition of customer service problems		
	Understand how to monitor and solve customer service problems		
305	Set objectives and provide support for team members		
	Be able to communicate a team's purpose and objectives to the team members		
	Be able to develop a plan with team members showing how team objectives will be met		
	Be able to support team members identifying opportunities and providing support		
	Be able to monitor and evaluate progress and recognise individual and team achievement		
306	Monitoring operational performance		
	Understand the principles of operational performance measurement		
	Be able to establish and monitor performance indicators		
307	Operate security measures		
	Be able to determine the effectiveness of current security measures		
	Be able to report any weaknesses in security measures		
308	Maintain property and assets		
	Be able to identify maintenance requirements		
	Be able to plan and schedule the maintenance of property and assets		
	Be able to carry out required maintenance activities		
309	Procure supplies		
	Be able to identify requirements for supplies		
	Be able to evaluate suppliers that meet identified requirements		
	Be able to select suppliers and obtain supplies		
	Be able to monitor supplier performance		
310	Contribute to disaster recovery and contingency planning		
	Understand the principles and processes involved in disaster recovery and contingency planning		
	Be able to identify disaster recovery and contingency planning requirements		
	Be able to monitor and adjust disaster recovery and contingency planning processes		

Unit	Duties	Examples	Training Required
311	Manage space		
	Understand the principles of space utilisation		
	Be able to identify the space needs of clients		
	Be able to manage the space needs of clients		
312	Carry out energy management		
	Understand the principles of energy management		
	Be able to identify energy management processes		
401	Develop and implement a risk assessment plan in own area of responsibility		
	Understand the legal requirements and personal responsibilities for health and safety within an organisation		
	Be able to promote the importance of health and safety practices		
	Be able to ensure that hazards and risks are identified and managed in own area of responsibility		
	Be able to monitor and review health and safety performance and policy in own area of responsibility		
402	Understanding sustainability and environmental issues and the impact on facilities management		
	Understand sustainability and corporate responsibility		
	Understand the impact of facilities management on the environment		
	Understand how to manage waste and its safe disposal		
	Understand how to improve environmental awareness and responsibility Assessment criteria		
403	Provide leadership and direction for own area of responsibility		
	Be able to lead in own area of responsibility		
	Be able to provide direction and set objectives in own area of responsibility		
	Be able to communicate the direction for own area of responsibility and collect feedback to inform improvement		
	Be able to assess own leadership performance		
404	Implement change in own area of responsibility		
	Understand how to implement change in own area of responsibility		

Unit	Duties	Examples	Training Required
	Be able to involve and support others through the change process		
	Be able to implement and monitor a plan for change in own area of responsibility		
405	Specify, commission and manage external contracts and agreements		
	Understand the requirements for specifying, commissioning and managing external contracts and agreements		
	Be able to specify, commission and manage external contracts and agreements		
501	Recruit staff in own area of responsibility		
	Be able to review human resource requirements to meet business objectives in own area of responsibility		
	Understand the importance of ensuring that recruitment and selection processes meet legal, regulatory, ethical and social requirements		
	Be able to participate in the recruitment and selection process		
	Be able to evaluate the recruitment and selection process and identify improvements for the future		
502	Manage a budget for own area or activity of work		
	Be able to prepare a budget for own area of responsibility		
	Be able to manage a budget		
	Be able to review budget management performance		

Appendix 4 Expert/witness status list

Learner name:

Name and Witness Signature	Status *	Professional relationship to learner **	Outcomes witnessed

*** Status**

1 Occupational expert meeting specific requirements for role of expert witness

3 Non expert familiar with the standards

2 Occupational expert not familiar with the standards

4 Non expert not familiar with the standards

**** Professional relationship to learner**

Manager = M Supervisor = S Colleague = Coll Customer = Cus Other (please specify)

Appendix 5 Assessment/action planning

Learner Name _____ Assessor Name _____ Date _____

Review of previous plan

Record of session

Feedback on session

Actions to be reviewed at next session	Date

Units/Outcomes completed

--	--	--	--	--	--

Signature of learner.....

Signature of assessor.....

Appendix 6 Summary of achievement

Learner _____ name:

Learner _____ enrolment _____ number:

Unique learner number: _____

Centre number: _____

Assessor(s) and Internal Verifier(s) must print their name and provide a sample signature in the table below. This is necessary for validating the signature provided by the Assessor/Internal Verifier to confirm that the learner has met all of the necessary requirements to complete the specified unit.

Please see unit achievement list on the next page.

Assessor(s)

Assessor(s) Name (print) 1. _____ 2. _____ 3. _____

Signature: _____

Countersigning Assessor(s) Name (print) 1. _____ 2. _____ 3. _____

Signature: _____

Internal Verifier(s)

Internal Verifier(s) Name (print) 1. _____ 2. _____ 3. _____

Signature: _____

Countersigning Internal Verifier(s) (print) 1. _____ 2. _____ 3. _____

Signature: _____

Useful contacts

UK learners

General qualification information

T: +44 (0)844 543 0033

E: learnersupport@cityandguilds.com

International learners

General qualification information

T: +44 (0)844 543 0033

F: +44 (0)20 7294 2413

E: intcg@cityandguilds.com

Centres

Exam entries, Certificates, Registrations/enrolment, Invoices, Missing or late exam materials, Nominal roll reports, Results

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: centresupport@cityandguilds.com

Single subject qualifications

Exam entries, Results, Certification, Missing or late exam materials, Incorrect exam papers, Forms request (BB, results entry), Exam date and time change

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

F: +44 (0)20 7294 2404 (BB forms)

E: singlesubjects@cityandguilds.com

International awards

Results, Entries, Enrolments, Invoices, Missing or late exam materials, Nominal roll reports

T: +44 (0)844 543 0000

F: +44 (0)20 7294 2413

E: intops@cityandguilds.com

Walled Garden

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F: +44 (0)20 7294 2413

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If you have a complaint, or any suggestions for improvement about any of the services that City & Guilds provides, email: feedbackandcomplaints@cityandguilds.com

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